



APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF ARCHIVES AND HISTORY
RECORDS MANAGEMENT DIVISION

INSTRUCTIONS: See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address Office of Planning and Budget Physical and Economic Development Div. Room 615 270 Washington Street, SW Atlanta, Georgia 30334	Application Number 79-267	
Application Number		Date Received DEC 17 1979	Date Completed DEC 31 1979
2. Person to Contact Lowell Evjen		Working Title Director	Telephone Number 656-3861
3. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest _____ Latest _____ to date		5. Records Series Title (followed by title used in office, if different) STATE AGENCY ANNUAL OPERATING BUDGET & EXECUTION ANALYST FILES	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? Headed by a Director, the Physical & Economic Development Division performs all functions relating to budget analysis and policy planning for the agencies of State government responsible for administering State laws relating to natural resources, transportation and economic development. These agencies are the Departments of Transportation, Natural Resources, Community Affairs, Industry and Trade; and the State Forestry Commission, the Public Service Commission, and the Soil and Water Conservation Committee. This Division is also responsible for economic development planning and planned growth activities.			
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: requesting, analyzing, planning and authorizing the expenditure of funds appropriated by the General Assembly for those State agencies responsible for administering State laws relating to natural resources, transportation and economic development. Included are: Agency Annual Operating Budget; amendments to the Annual Operating Budget; Quarterly Allotment Requests; internal analysis sheet(s); Quarterly Expenditure Reports reflecting how funds were spent; copies of Department requests for transfer of funds, Division analyses. Also included may be reference copies of Minutes of Meetings held by the Fiscal Affairs Sub-Committees of the Senate and House. File is arranged: chronologically by fiscal year; thereunder alphabetically by State agency.			
8. Monthly Reference Rate How often are records referred to which are: One to six months old _____; Seven to twelve months old _____; Thirteen to twenty-four months old _____; twenty-five months and older _____?			
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) _____			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
X		d. Does this series have historical or long term research value?
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	X	h. Is there a duplication of this series in your office, or in another office or agency? portions duplicated in each If yes, where? State agency; Legislative Budget Office; expenditures reflected in the
	X	i. Is this series (or a major portion of it) regularly microfilmed? Annual State Audit
	X	j. Does the record series result in a computer printout?

11. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|----------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | 1 _____ years. |
| c. Federal law | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☒ Hold in the current files area _____ month(s) 1 _____ year(s); then
- ☐ Transfer to local holding area, hold _____ year(s); then
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☐ Destroy.
- ☒ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>M. E. ...</i>	11/5/79	<i>J. W. Braselton (MKT)</i>	
		State Records Committee (Signature)	Date
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Auditor/Designee	12-27-79
		Secretary of State/Designee	12-21-79
		Attorney General/Designee	12-28-79